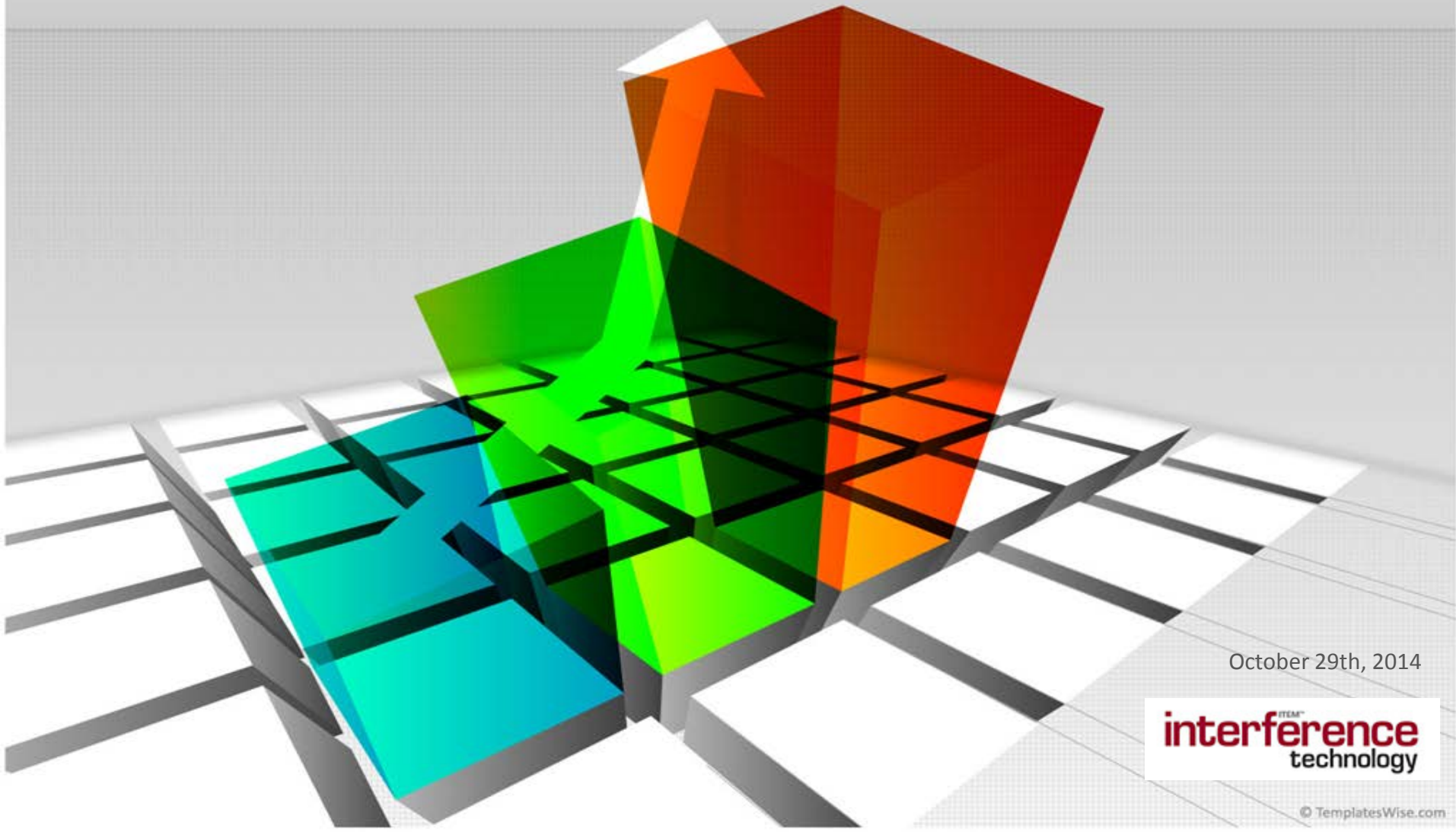
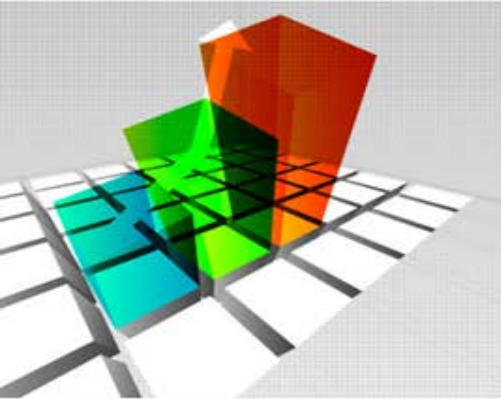


# EMI-EMC Supplier Survey 2015



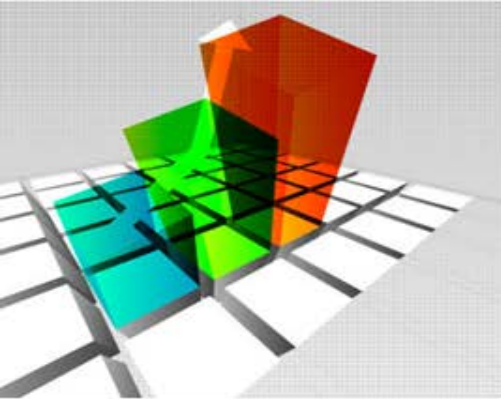
October 29th, 2014

**interference**<sup>TEAM</sup>  
technology



# Introduction

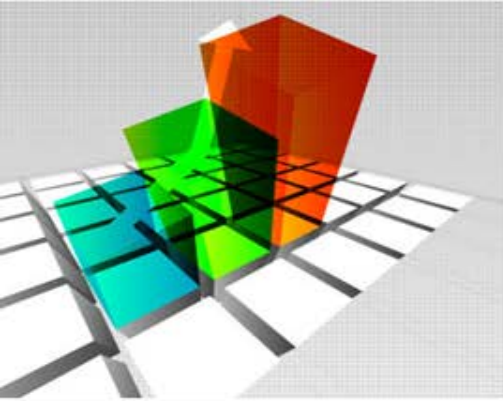
- September - October 2014
- Joint study of global EMC markets
- Looking at supplier confidence, growth /decline markets, and challenges



# Methodology

	China	Europe	N. America
EMC Test Equipment (Test)	☆	☆	☆
EMC Components & Materials (Design)	☆	☆	☆

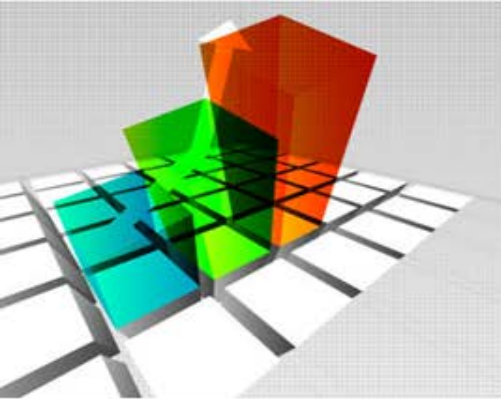
- 6 Sectors
- Email , Phone Calls, Online Survey
- Interviewed 44 people at 38 companies



## 2 Identification Questions

Q1. Select a Sector: Components & Materials or Test Equipment

Q2. Select a Region: China, Europe or North America



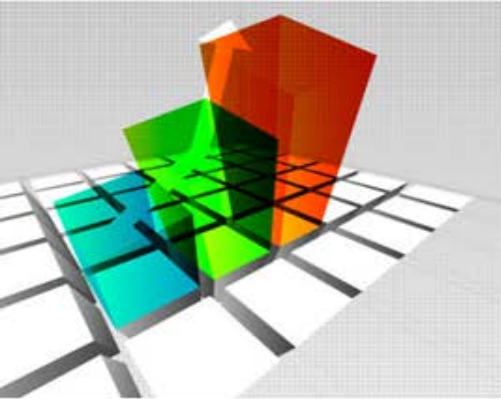
# 4 Survey Questions

Q1. Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?

Q2. Please rate the markets for *current* revenue for your company from 1 to 5 (1 least, 5 most)?

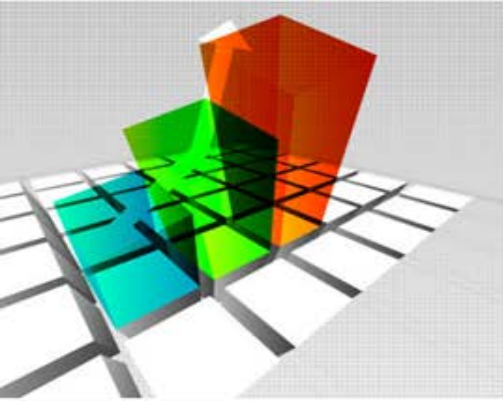
Q3. Please rate the markets for *future* growth potential for your company over next 12 months?

Q4. Please rate the areas that you feel will challenge your company's growth over the next 12 months?

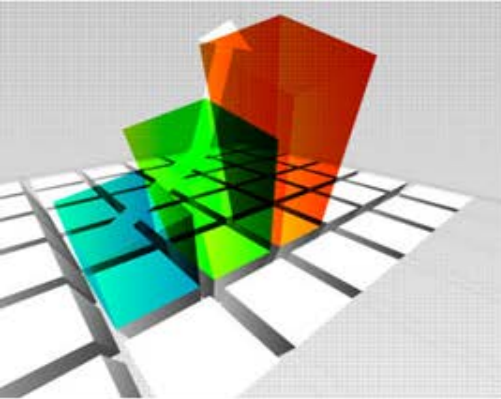


# Methodology

- Rate each market 1 to 5
- 1 is low - 5 is high
- Average 8 companies per category responding
- High score, e.g. 40
- Low score, e.g. 10
- Companies who participated, anonymously, share the data.
- Others – highlights only



# EMC Components & Materials Markets



# EMC Components & Materials: China

Q1: Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?

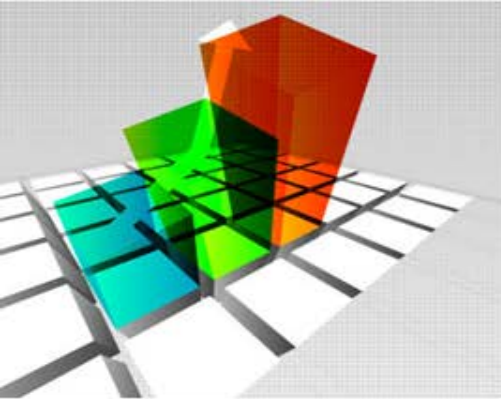
## 2015 Growth Prediction

China EMC Design Suppliers



■ Minus 20% or More ■ <10 ■ <5 ■ 0 ■ >5 ■ >10 ■ Plus 20% or More





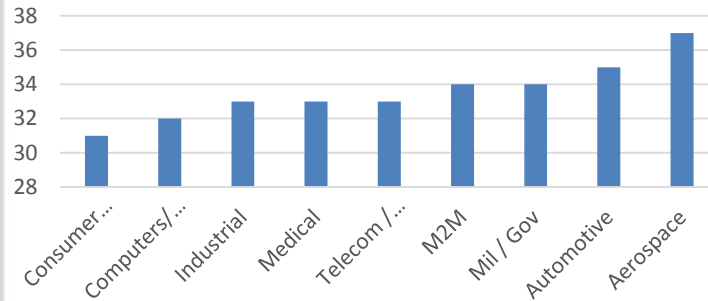
# EMC Components & Materials: China

## 2014 ~ 2015 Comparison

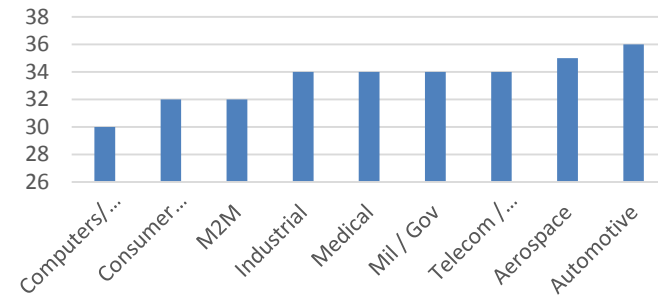
*China EMC Design Suppliers*

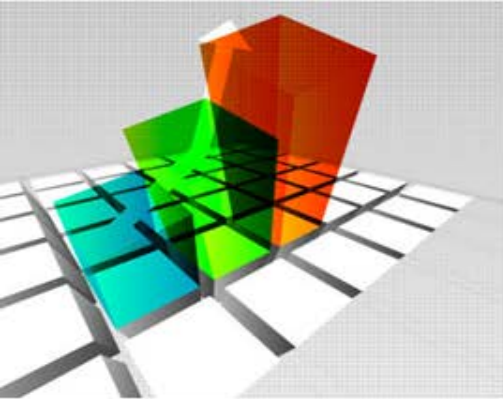
### 2014 Revenue Importance

*China EMC Design Suppliers*



### 2015 Revenue Importance



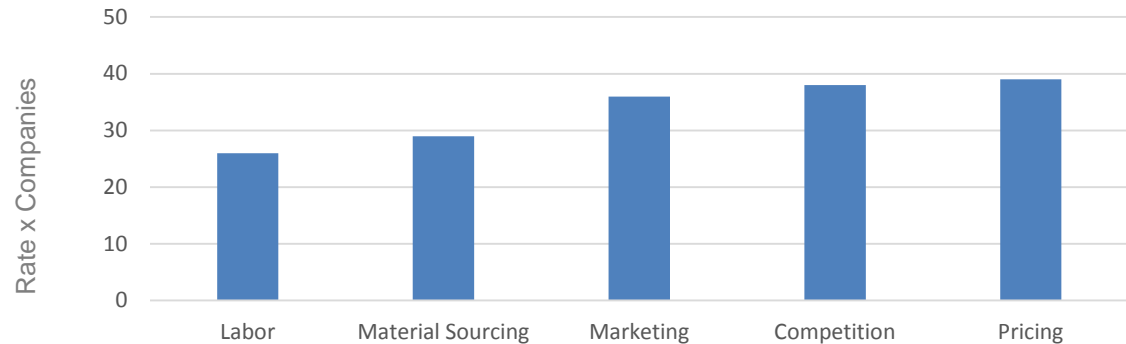


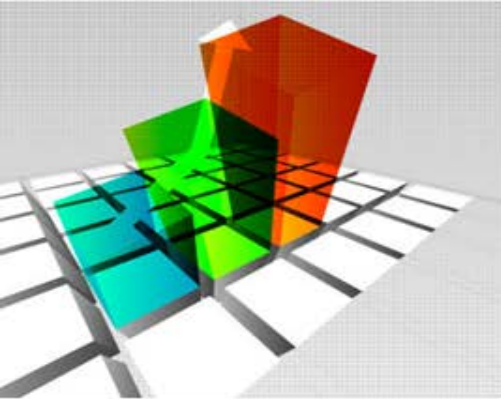
# EMC Components & Materials: China

*Q4: Please rate the areas that you feel will challenge your company's growth over the next 12 months?*

## 2015 Challenges

China EMC Design Suppliers



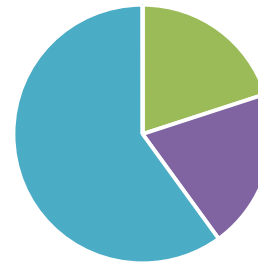


# EMC Components & Materials: Europe

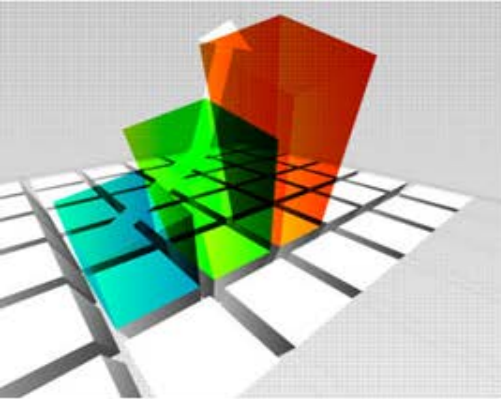
*Q1: Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?*

## 2015 Growth Prediction

Europe EMC Design Suppliers



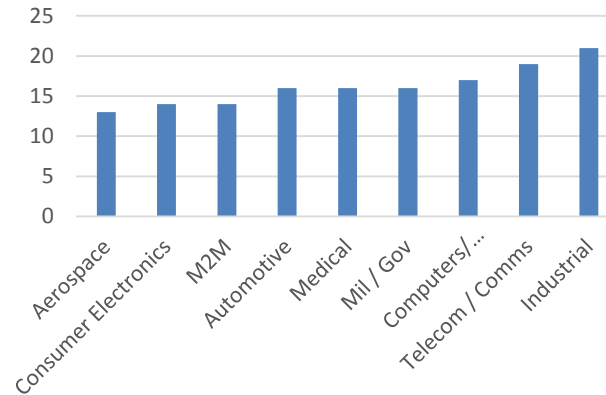
■ Minus 20% or More ■ <10 ■ <5 ■ 0 ■ >5 ■ >10 ■ Plus 20% or More



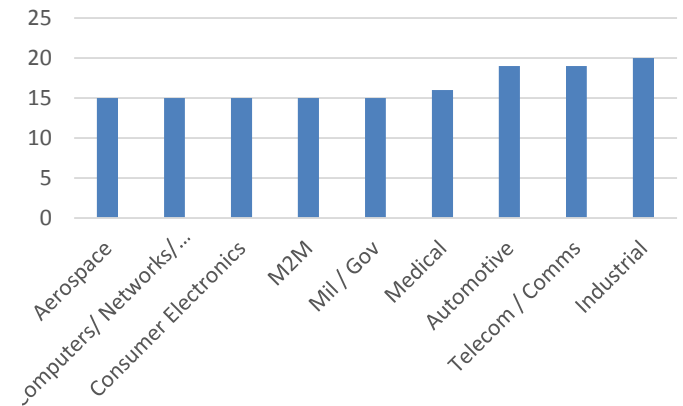
# EMC Components & Materials: Europe

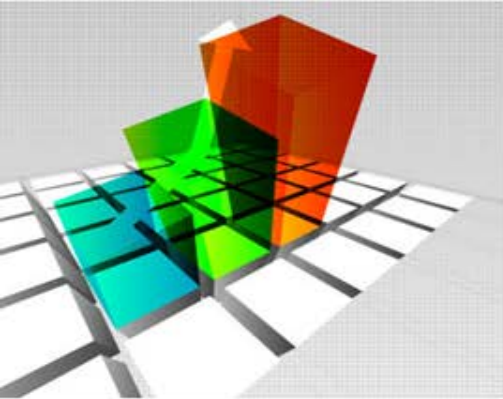
## 2014 ~ 2015 Comparison

2014 Revenue Importance  
Europe EMC Design Markets



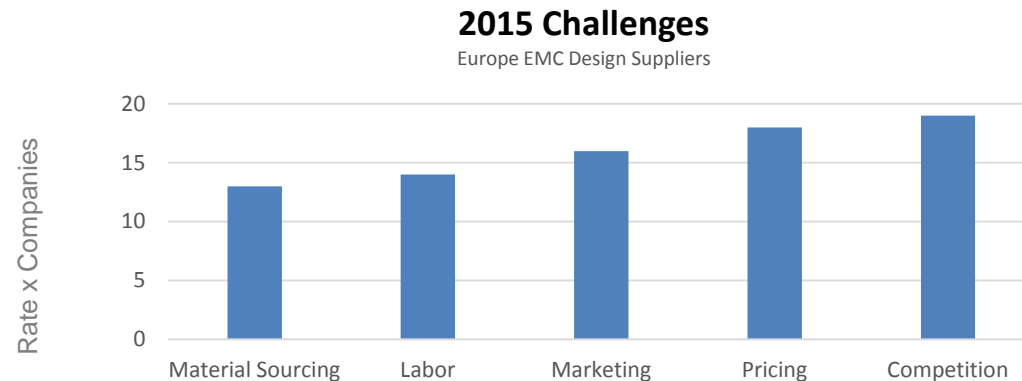
2015 Revenue Importance  
Europe EMC Design Markets

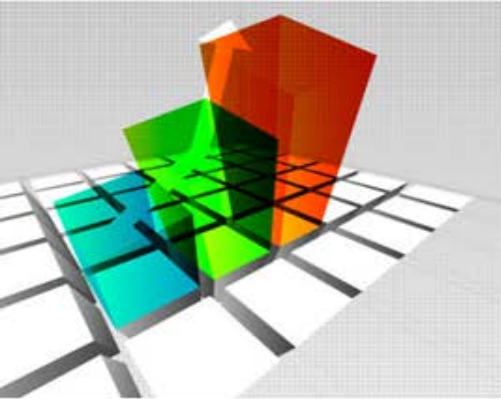




# EMC Components & Materials: Europe

*Q4: Please rate the areas that you feel will challenge your company's growth over the next 12 months?*



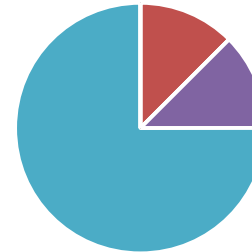


# EMC Components & Materials: North America

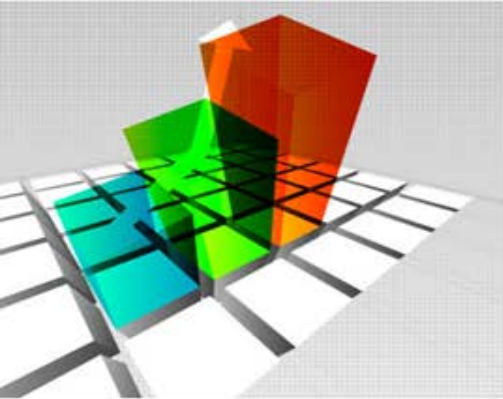
*Q1: Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?*

## 2015 Growth Prediction

North America EMC Design Suppliers



■ Minus 20% or More ■ <10 ■ <5 ■ 0 ■ >5 ■ >10 ■ Plus 20% or More

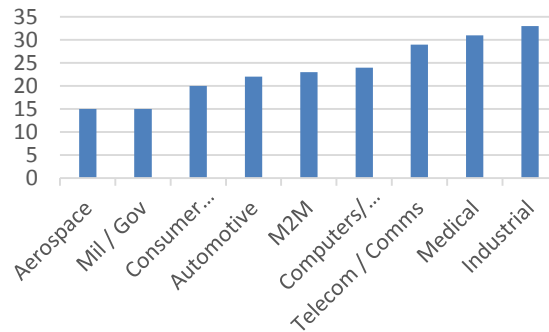


# EMC Components & Materials: North America

## 2014 ~ 2015 Comparison

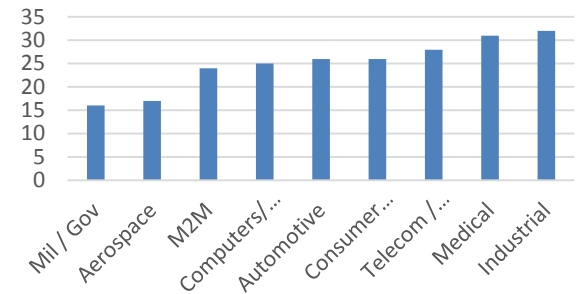
### 2014 Revenue Importance

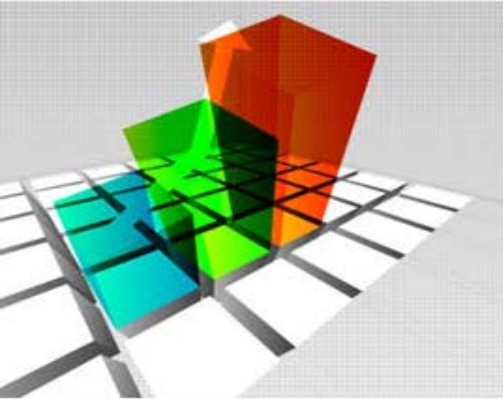
North America EMC Design Markets



### 2015 Revenue Importance

North America EMC Design Markets



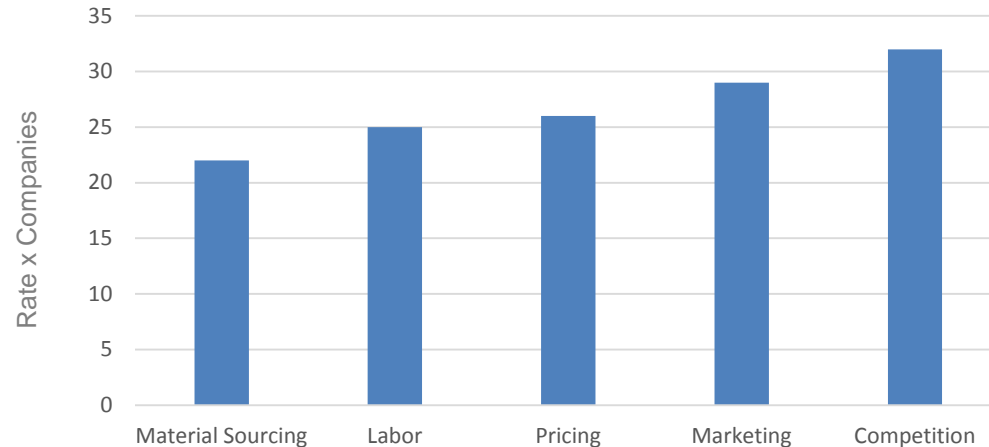


# EMC Components & Materials: North America

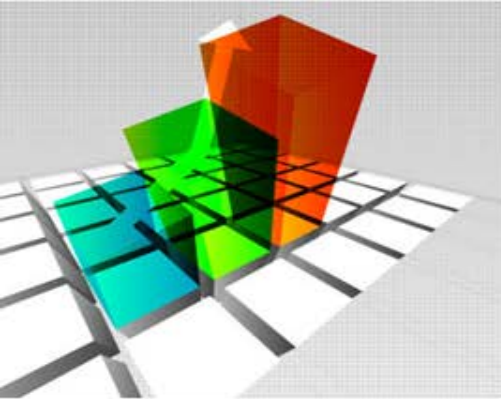
*Q4: Please rate the areas that you feel will challenge your company's growth over the next 12 months?*

## 2015 Challenges

North America EMC Design Companies



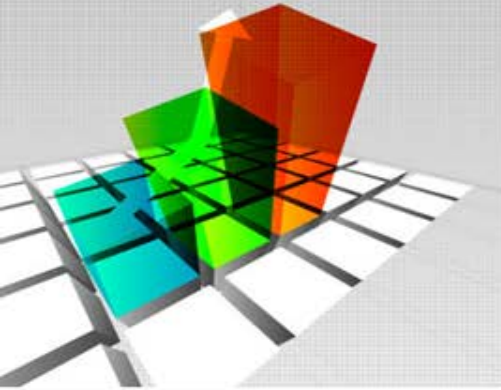




# EMC Components & Materials: The Biggest Movers 2015

## The Biggest Movers for 2015

1. North America / Consumer Electronics
  2. Europe / Automotive
  3. North America / Automotive



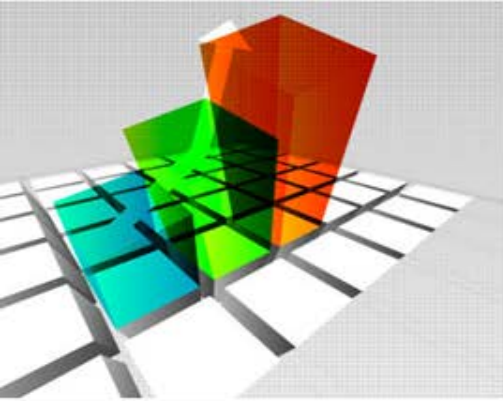
# EMC Global Markets: The Biggest Challenges 2015

## EMC Components & Materials:

*China/Pricing*

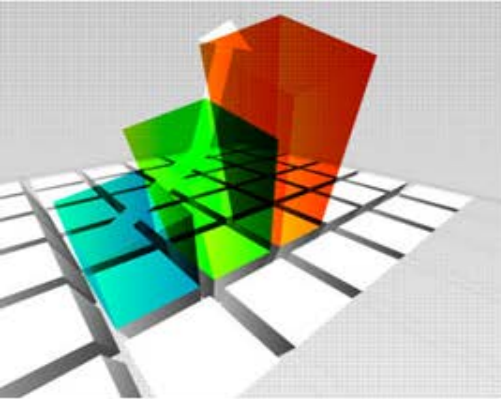
*Europe/Competition*

*North America/Competition*



# EMC Global Markets: 2015

## ***New Marketing Solutions***



# 2015: EMC Marketing Solutions

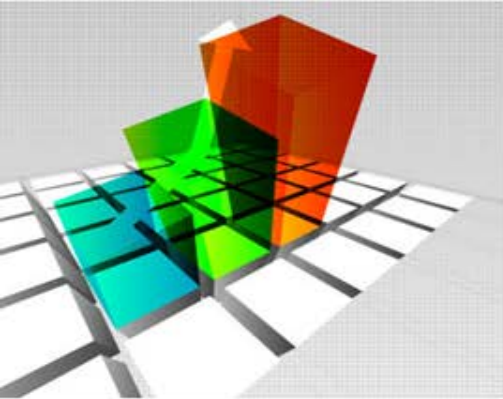
**EMC LIVE 2015**

April 28 ~ 30, 2015  
[www.emclive2015.com](http://www.emclive2015.com)

**EMC LIVE 2015**  
**TEST BOOTCAMP**

**EMC LIVE 2015**  
**DESIGN BOOTCAMP**

**interference**<sup>TEAM</sup>  
technology



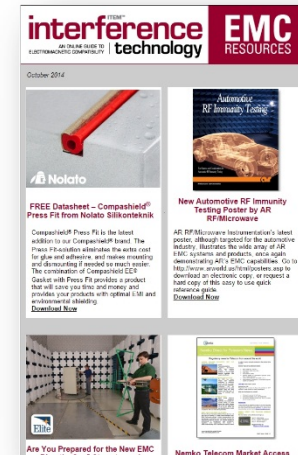
# 2015: EMC Marketing Solutions

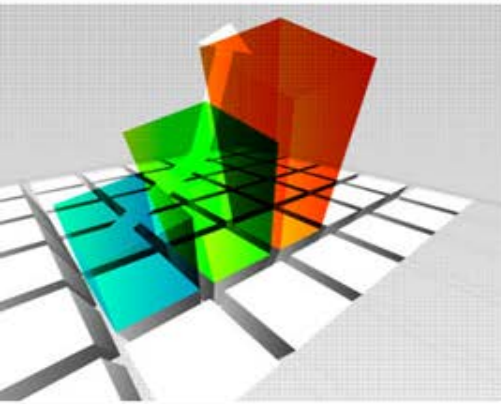
## EMC Resources

Highly Targeted Leads Online / Email



+





# 2015: EMC Marketing Solutions

Thank You

**interference**<sup>ITEM™</sup>  
technology